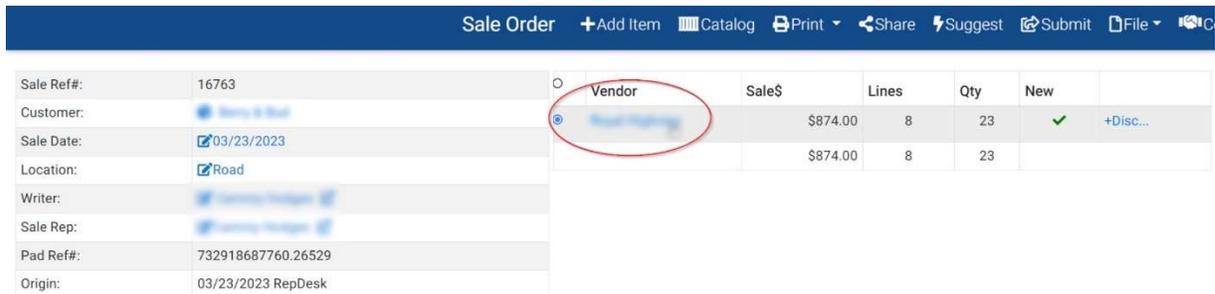


## How to tokenize payment information in RepDesk

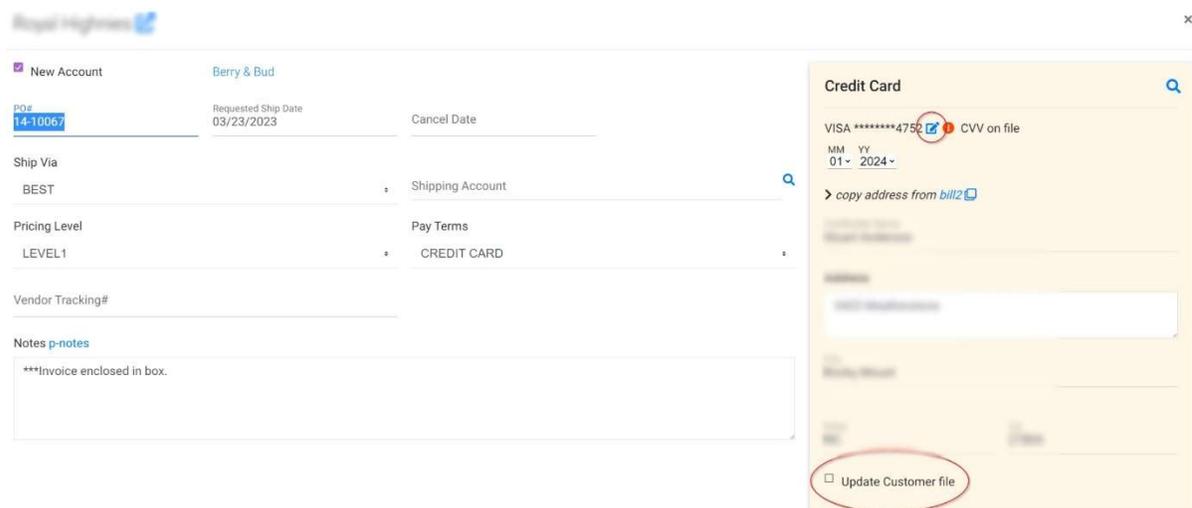
This documentation will provide the steps necessary for tokenizing a customer's payment information in RepDesk.

1. First, find an existing sales order, or make a new one if there are no existing orders, with the customer and vendor you would like to tokenize. Select the vendor in that sales order.



Sale Order							
+ Add Item   Catalog   Print   Share   Suggest   Submit   File							
Sale Ref#:	16763	Vendor	Sale\$	Lines	Qty	New	
Customer:	Berry & Bud	Berry & Bud	\$874.00	8	23	✓	+Disc...
Sale Date:	03/23/2023		\$874.00	8	23		
Location:	Road						
Writer:							
Sale Rep:							
Pad Ref#:	732918687760.26529						
Origin:	03/23/2023 RepDesk						

2. Next, you will have to edit and update the card that you would like to tokenize. To do this, please select the edit icon and add the CC information and then select "Update Customer file" on the bottom of the section. Please note that the credit card information such as the address, zip code, name, etc., must match the card holder's information.



RepDesk | Berry & Bud

New Account

PO# 14-10067 | Requested Ship Date 03/23/2023 | Cancel Date

Ship Via BEST | Shipping Account

Pricing Level LEVEL1 | Pay Terms CREDIT CARD

Vendor Tracking#

Notes p-notes  
\*\*\*Invoice enclosed in box.

**Credit Card**

VISA \*\*\*\*\*4752 CVV on file

MM YY 01 - 2024 -

> copy address from bill2

Update Customer file

3. You will be able to tell if the tokenization was successful by not being able to edit the fields in the credit card section. The address, city, state, CVV, etc., fields will be "greyed out" and will not be editable. Please see example below

### Credit Card 🔍

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Visa \*\*\*\*\*1194 ✎

MM YY  
12 - 2026 -

Cardholder Name

Address

City

State  Zip

Update Customer file

There could be a few different reasons why a card is not able to be tokenized. It could be that inaccurate card information was entered, such as the address, number, or zip code.